



Project Tracking System Update

FDE Projects – August 2004

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FDE Reviews

Facilities Development Division is receiving an increasing number of Facilities Development Evaluation (FDE) review requests. These projects are currently only being tracked on paper and/or improperly within the Logbook system, which is creating bad data. FDE projects consist of reviews of Clinics, license status changes, and any no construction cost reviews. In order to track and account for these projects accurately, we have modified the Logbook system to handle them. This document will serve as the user manual for FDE projects within the Logbook system.

Business Rules

- FDE projects can be performed on any facility type.
- Licensed Clinics will be given 3* series facility numbers, paralleling the ALIRTS Perm ID numbers when applicable.
- 3* facilities can only be issued E projects. (No G, S, H, I)
- FDE projects will be designated within the logbook by a standard project number beginning with E (E?#####). E projects will not have sub projects.
- A new 391 cost code was added to indicate project will be billed hourly. Description will be FDE Review.
- 391 cost codes can only be used on E projects.
- Geotech reviews will still be billed at the standard \$5000.
- FDE reviews have same review goals and estimated hours as S* projects.
- FDE projects are closed at plan approval after confirmation from user.
- FDE projects are not SB1953 eligible.
- DSE, ACO, and FLSO required checkboxes default to null.
- Construction oversight consists of ACO oversight only; no building permit is issued.
- ***A MANUAL INVOICE MUST BE GENERATED FOR E PROJECTS BY THE PROJECT MANAGER.***
 - The 391 cost code tells accounting not to bill at the standard 1.64 or 1.5 percent but to wait for a copy of the manual letter informing the client of the billable hours for the project. Geotech (330) cost activity entries will still be billed at the standard \$5000 by FPS, no manual process is necessary.

Create New Project screen

- Facility group: Facility field now accepts 3* facilities. If you cannot find the facility number, please send the facility information to Logbook Support.
- Project group: Class – Type E added to drop down list.
If 3* facility selected, only E project class is allowed.
Plan Review Code
 - Default to 325
 - All activity codes, except 330, set cost act code to 391.
 - 330 Activity code sets cost act code to 330.
- Cost Estimate group: Activity code – Will only allow 391 or 330 activity code.
Construction Cost & Radiology Cost – Not required.
- License group: No Change.
- Inventory group: SB1953 Const Project – Not visible.
Part J check box – Not visible.
- Saving: Same processes without SB1953 confirmation message box.

Timesheet screen

Accepts E project numbers.

Same activity code validation as S projects.

Project Info screen

All SB1953 fields have been hidden.

Review screen

Review turn-around times and estimated review hours will be the same as S projects.

Plan Approval and Closing a Project:

When setting plan approval, after the Plan Approval prompt, you will be asked if you would like to now close this project (default selection is yes). If yes, set the status to CLSD and set the date closed to current date. (See screen print below)

FDD TESTING AND DEVELOPMENT VERSION - FDD LogBook Program - Version: 492 ACTIVE

File View Reports Utilities About

TimeSheet Project Info **Review** Construction Closure License 0 Memos 0 Facility

Project ES040037 - 0 Cnty 33 Facno 37529 Kind R Facility ADVANCED PAIN MANAGEMENT

Status CLSD Scope TESTING ADDING COST AGAIN

Date In 5/24/04 Appr Ltr Field Accepted Date Closed 6/23/04

Records: 2 Contracted Project? N <-SET Delete

	ACT	PAD	BCK	INC	MGR	MGRI	MGRO	LT	A	A-in	A-out	AR	M	M-in	M-out	MR	E
	325	0			FAR	5/24/04	8/12/04	AP									
	331	0			FAR												

Checking Project Closure Intentions!

Does Plan Approval for this E project complete the project?

Selecting YES will close the project.

Yes No

MGR

Ini FAR Days 80

Act 331 In 5/24/04

Ave 7/23/04 Out 8/12/04

Ltr AP

	Arch	Mech	Elec	Stru	FLSD	Inc
Ini						
In						
Out						
RoR						
Hrs	3.3	6.05	3.85	7.7	2.2	
ERH	3.3	6.05	3.85	7.7	2.2	

Remark

Add Save ReCalc Cancel

Network User: BRUTSCHM 8/12/04 11:29 AM

When you are adding plan review activity code, the program will ensure a 391 cost code has been entered on closure screen. If a 391 code has not been entered on the closure screen, you will receive a reminder prompt.

Construction screen

DSE, FLSO, ACO required boxes set to null by default but can be changed to add E projects to field staff reports.

Reopening a project:

If Plan Review Approval Letter and type fields are deleted, the program will set the closure status to OPEN and clear the Date Closed field. As normal, the program will also clear the plan approval milestone.

Building permit and IOR related fields have been removed because FDD does not normally oversee construction on FDE projects. When FDD does become involved with construction, it will consist of ACO oversight only, which will be tracked in the Field Staff Visit Log.

FDD TESTING AND DEVELOPMENT VERSION - FDD LogBook Program - Version: 492 ACTIVE

File View Reports Utilities About

TimeSheet Project Info Review **Construction** Closure License 0 Memos 0 Facility

Project ES040037 Cnty 33 Facno 37529 Kind R Facility ADVANCED PAIN MANAGEMENT

Status CLSD Scope TESTING ADDING COST AGAIN

Date In 5/24/04 Appr Ltr 8/12/04 Field Accepted Date Closed 8/12/04

Received Returned Accepted

TIO TIO Plan Approval Letter Type Cleared On

Plan Review Approval Letter 8/12/04

Plan Approval Type (AP/AC) AP Cleared On

Construction Start Date ACO Required? FLSO Required? DSE Required?

ACO MFM FLSO GAM DSE MAB

Field Staff Report Log

INI	Date	Percent Done
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Help Add Record Delete

Current Cost 0

Rad Eq Cost 0

Beds Before const. 0

Beds after const. 0

Network User: BRUTSCHM 8/12/04 11:37 AM

Closure screen

Since FDE projects are considered closed once the plans are approved, the closure screen will be used only for tracking costs. 391 or 330 cost codes are the only cost codes allowable on FDE projects.

All verified report fields and request letter fields have been removed, and the date closed field does not generate a letter for FDE projects.

FDD TESTING AND DEVELOPMENT VERSION - FDD LogBook Program - Version: 492 ACTIVE

File View Reports Utilities About

TimeSheet Project Info Review Construction **Closure** License 0 Memos 0 Facility

Project Cnty Facno Kind Facility

Status Scope

Date In Appr Ltr Field Accepted Date Closed

Date	ACT	Cost Est	Rad Cost	Remark
8/12/04	391	\$1,000,000.00	\$0.00	

Plan Approval Date

Constr Start Date Closed

Field Accepted Status

Network User: BRUTSCHM 8/12/04 11:51 AM